

PAGE 1/12 \* RCVD AT 7/20/2007 11:41:41 AM [Eastern Daylight Time] \* SVR:USPTO-EFAX \* DNS:2736126 \* CSID:4123556501 \* DURATION (mm-ss):02-32

# K&L | GATES

Kirkpatrick & Lockhart Preston Gates Ellis LLP  
Henry W. Oliver Building  
535 Smithfield Street  
Pittsburgh, PA 15222-2312  
412.355.6500  
F 412.355.6501

## FAX

---

**Date •** July 20, 2007

**Pages •** 12

**Time •**

**Transmit To •** Examiner Kirsten S. Apple

**Company/Firm •** United States Patent and Trademark Office

**Telephone No. •** 571.272.5588

**Fax No. •** 571.273.6126

**From •** Michael D. Lazzara

**Phone •** 412.355.8994

**Secretary •** Carole Steigerwalt

**Phone •** 412.355.6482

**Lawyer ID •** 7814

**Client/Matter Name •** InvestEdge, Inc.

**Client ID/Matter No. •** 0224730.0101

---

### COMMENTS:

### PROPOSED AGENDA

---

When you are sending to us, please be sure to include a cover sheet with your transmittal and a telephone number where you can be contacted in case of equipment malfunction.

**Transmitted by:**

**Time:**

---

**IMPORTANT:** The materials transmitted by this facsimile are sent by a lawyer or his/her agent, and are considered confidential and are intended only for the use of the individual or entity named. If the addressee is a client, these materials may also be subject to applicable privileges. If the recipient of these materials is not the addressee, or the employee or agent responsible for the delivery of these materials to the addressee, please be aware that any dissemination, distribution or copying of this communication is strictly prohibited. If you have received this communication in error, please immediately notify us at **412.355.6500 (collect)** and return the transmitted materials to us at the above address via the U.S. Postal Service. We will reimburse you any costs incurred in connection with this erroneous transmission and your return of these materials. Thank you. **Please report problems with reception by calling 412.355.6500.**

PI-1812683 v1

PATENT  
00564

IN THE UNITED STATES PATENT AND TRADEMARK OFFICE

Art Unit: 3628

Examiner: Apple, K.

In re Application of:  
Stewart et al.

Serial No.: 09/915,993

Filing Date: July 26, 2001

INTEGRATED INVESTMENT  
MANAGEMENT SYSTEM WITH  
NETWORK DATAFEED

Technology Center 3600

JUL 24 2007

RECEIVED

PROPOSED TELEPHONE INTERVIEW AGENDA

July 20, 2007

Commissioner for Patents  
P.O. Box 1450  
Alexandria, VA 22313-1450

Attn: Examiner Apple

Dear Examiner Apple:

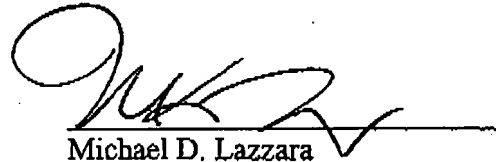
Applicants propose the following agenda items for a telephone interview (to be scheduled) to discuss rejections currently set forth against the captioned patent application:

1. Discussion of Proposed Claim Amendments (see attached).
2. Discussion of Reddy (U.S. Pat. No. 6,564,191) in view of Proposed Claim Amendments.

1812623

The examiner is invited to call or e-mail Applicants' undersigned representative to schedule a mutually convenient time for the telephone interview.

Respectfully submitted,



Michael D. Lazzara  
Reg. No. 41,142

Attorney for Applicants

KIRKPATRICK & LOCKHART PRESTON GATES ELLIS LLP  
Henry W. Oliver Building  
535 Smithfield Street  
Pittsburgh, Pennsylvania 15222-2312

Telephone: (412) 355-8994  
Fax: (412) 355-6501  
E-mail: [michael.lazzara@klgates.com](mailto:michael.lazzara@klgates.com)

Customer No. 26285